

2. Involve businesses and employers in the EIC campaign

Why is this important?

Because the EIC is a tax benefit for people who work, employers are a logical and important partner in any campaign. Remember, businesses have both employees *and* customers who could be eligible for the EIC — this makes them a great vehicle for outreach.

Also keep in mind that the government is a large employer in most states and localities. Government employees often earn modest wages and may be eligible for the credit. They may also work with potential EIC recipients.

Businesses should be encouraged to publicize the EIC to their employees and customers. They can also be asked to provide financial assistance or in-kind contributions for the operation of a campaign.

How do you do it?

Get local employers interested in the EIC by stressing these points:

- The EIC supplements employees' wages at no cost to employers.
- An EIC refund helps customers pay bills.
- The EIC brings lots of federal dollars into local economies.
- Publicizing the EIC will increase the company's visibility in the community.

What can employers do?

1. Send information to all their employees. Both public and private sector employers can include an EIC envelope stuffer or brochure with workers' W-2 forms. EIC information can also be sent with employee paychecks in December, January, February, or March.

2. Alert workers to the availability of advance EIC payments. Advance payment of the EIC increases the size of workers' paychecks at no cost to the employer. *For more information on this option, see the fact sheet in this kit called "Increasing Workers' Take-Home Pay: The EIC Advance Payment Option."*

Campaign Tips!

■ Campaigns can increase their success with employers by first gaining the support of the Chamber of Commerce, merchants' associations and other business groups.

■ Ohio and Texas have reached thousands of employers: In Ohio, the Governor sent a letter about the EIC and the advance payment option with the quarterly tax returns sent to *every* employer in the state; The Texas Comptroller's Office offered outreach materials to 400,000 employers. *For more information, contact Teri Dixon of the Ohio IRS at (513) 684-2172, or Carmen Luevanos of the Texas Comptroller's Office at (512) 463-4511.*

■ Many utility companies are active campaign partners. Edison Electric Institute and American Gas Association, two utility trade groups, have worked with the Center on Budget and Policy Priorities to involve utility companies. This kit is sent to EEI and AGA members nationwide. *Call the Center to see if the utility company near you has expressed interest in the EIC.*

■ Outreach in the business sector can come *from* employees too! Employees can generate interest in the EIC through their unions by posting notices on bulletin boards, discussing the credit at meetings, and printing information in newsletters.

3. Include information in employee newsletters. For a sample newsletter article on the EIC, contact the Center on Budget and Policy Priorities.

4. Make information available at the worksite. Employers can leave flyers or hang posters near the time clock, in the staff lounge, or in office waiting rooms.

5. Inform workers about state Earned Income Credits. Currently, workers in Minnesota, New York, Vermont, and Wisconsin can get a refundable state EIC in addition to their federal EIC. *For more information, see page 24 of this guide.*

6. Involve VITA. Employers with many low-wage employees can arrange for a free tax preparation clinic at the work site. *Phone numbers for the IRS's local taxpayer education coordinators, who can help employers set up a free tax clinic, are listed in the fact sheet section of this kit.*

7. Inform customers. Stores can stuff shopping bags with EIC flyers; utility companies can include EIC information with monthly bills. The envelope stuffer and brochure in this kit are easy to copy and distribute.

3. Set up an EIC hotline

Why is this important?

Campaign organizers report that one of the most frustrating parts of doing EIC outreach is that the IRS information lines are almost always busy. As a result, many workers see an EIC flyer or poster and want to learn more, but can't. They may simply give up.

A local EIC information hotline is a great way to provide workers with information about eligibility, direct them to a nearby VITA site, and help them get the necessary tax forms.

Setting up an EIC hotline requires a lot of planning, but once it's done, the hotline will run itself!

How do you do it?

1. Decide how hotline calls will be answered. Hiring an answering service is probably the easiest way to set up an EIC hotline. While it may cost money, businesses or foundations in your community might be willing to help. If you decide not to hire an answering service, here are some other options:

- Ask an organization like the United Way if its information line operators can answer questions about the EIC during tax filing season — but make sure they are prepared for the extra volume of calls!

- If your target area is not too large, interns, volunteers, or a voice-mail system can refer callers to VITA sites.

- You can share costs by establishing a regional hotline with groups around your state or in nearby states.

2. Decide what your hotline will offer to callers.

The best EIC hotlines have a number of key features. They operate seven days a week, 24 hours a day — or at least during some non-business hours — and have operators that speak languages other than English, where needed. Your hotline can help callers determine if they are likely to be eligible for the credit (see sample script below), or it can simply refer them to VITA sites. It is extremely helpful to send callers a packet of materials, including:

- A simple cover letter describing the EIC and how to apply.
- Schedule EIC.
- A list of VITA sites in their area.
- A postage-paid business reply card so your campaign can get feedback on the success of the hotline.

Campaign Tips!

- The Help Line of Northern California Community Services handles several hundred EIC calls each year. Its toll-free number covers several counties in the Bay Area of California. *For more information, contact Ona Alvarez of Help Line at (415) 772-7380.*
- On a smaller scale, Cumberland Trace Legal Services in Bowling Green, Kentucky, set up its own hotline to serve workers in one rural county. *For more information contact Mark Esterle at (502) 782-1924.*
- If you can't staff a hotline with people who can answer detailed questions about the EIC, referring callers to VITA sites where they can get answers is a good option.

Sample EIC Hotline Script

Operator: "Thank you for calling the Earned Income Credit Hotline. Can I help you?"

Caller: "I'd like to know how I can receive the EIC."

Operator: "I'll need to ask you a few questions to see if you might be eligible. How many children are you raising in your home?"

If caller is raising one child: "was your 1996 family income less than \$25,078?"

If caller is raising more than one child: "was your 1996 family income less than \$28,495?"

If caller is not raising any children: "was your 1996 family income less than \$9,500 and were you between the ages of 25 and 64 at the end of 1996?"

If caller answers no to the above question: "I'm sorry. From what you've told me, you don't seem to be eligible for the Earned Income Credit. You might want to call the IRS to see if there are other tax benefits for which you are eligible. The number is 1-800-829-1040. That line is often busy, but if you're patient, you will get through."

If caller answers yes to the above question: "From what you have told me, it sounds like you probably are eligible to receive the Earned Income Credit."

If caller is raising children: "You need to file either a 1040 or a 1040A tax form. You can get one of these forms at your local library or post office. You also need to fill out and attach a second form called Schedule EIC. I will send you Schedule EIC. What is your address?"

If caller is not raising children: "You need to file a federal income tax return. You can get one of these forms at your local library or post office. I'll send you a reminder."

To all callers: "I will send you a list of places near you where you can get your tax forms filled out for free. At this site you can get answers to any other tax questions you have. Thank you for calling the EIC hotline!"

If caller has more questions: "You can get the answer from the IRS by calling 1-800-829-1040. I will also send you a list of places near you where you can get answers to your questions."

Note! Hotline operators should have some additional, basic information on hand regarding eligibility for the credit. They should know, for example, that both single and married people can file for the credit, and that foster children can count as "qualifying children."

4. Target special outreach efforts to workers without children

Why is this important?

Very low-income workers who are not raising children are eligible for a small EIC. Since tax year 1994 was the first year these workers could claim the credit, many eligible workers still may be unfamiliar with the EIC. Those who *have* heard of it may think it is a benefit only for people with children. New strategies and targeted efforts are needed to reach these workers and to encourage them to apply for the EIC.

How do you do it?

There are special challenges. For some workers, the new benefit may seem too small to make entering the tax system worthwhile — the average credit will be about \$180 in tax year 1996.

Many workers may fear a loss of other benefits such as SSI, General Assistance, or Medicaid. They may distrust employers who give out information about the EIC. Overcoming these concerns with facts about the credit is an important part of outreach. *For information about some of these concerns, see the sheet in this kit called: "Questions and Answers about the EIC."*

Letting these workers know about free tax help is especially important. These eligible workers earn very low wages and may never have filed a tax return (because they were not required to do so). Free tax preparation through the VITA program is an important resource for them.

Be innovative in reaching these eligible workers

To have incomes low enough to qualify for this credit, many of these workers will have been employed on and off during the year. Try distributing materials at:

- Pick-up and drop-off spots for day labor.
- National and regional service industry chains.
- Check-cashing outlets and convenience stores.
- Food Stamps, General Assistance, or unemployment offices.

Some of these workers may have disabilities or circumstances that have prevented them from holding full-time or higher-paying jobs. Try reaching them through:

- Food banks.
- Veterans Administration hospitals or service centers.
- Transitional housing programs.
- Homeless shelters.
- Probation offices.
- Half-way houses or mental health or substance abuse service centers.

Campaign Tips!

- Remember that workers whose earnings are too small to pay federal income taxes do not have to file their tax returns by the April 15 deadline. Outreach to these workers is relevant all year!
- In Chicago, a nonprofit group has developed a program to provide free tax preparation in homeless shelters. *For more information, call Mike O'Connor of the Center for Law and Human Services at (312) 341-1666.*

Some of these workers will be in school or training programs. Try distributing materials at:

- Universities with non-traditional students.
- English as a Second Language or literacy programs.
- Vocational Rehabilitation centers.
- Job training programs.

5. Involve government agencies in your campaign

Why is this important?

Government agencies provide a wide variety of services to low-income people, and are in a unique position to reach thousands of potential EIC recipients through their routine contact with clients. There are several reasons why it is important to reach out to clients of government agencies:

- When a person goes to work, government assistance payments usually decline. The EIC can help fill the gap.
- People receiving government benefits may not be working now, but if they worked at all during the year, chances are good they are eligible for the EIC.

Remember! The EIC does *not* count as income in determining eligibility or benefit levels for AFDC, Medicaid, Food Stamps, SSI, or federally assisted housing programs.

Most foster parents also are in regular contact with government agencies. Because state foster care payments are often low, many foster parents struggle to cover the costs of raising foster children. The EIC can help offset some of their expenses! Foster care payments do not count as income when determining eligibility for the EIC. Unfortunately, many foster parents don't know that they can qualify for the EIC so long as they had foster children living with them for the entire year. Even if the foster care arrangement is an informal one, the parent can qualify for the EIC.

How do you do it?

Identify the target audiences. There are many government assistance programs, each offering opportunities for reaching people who may be eligible for the EIC. Here are some key programs to target for outreach:

Public and subsidized housing
Subsidized child care
Job training programs
Unemployment programs
AFDC (Aid to Families with
Dependent Children)
Food Stamps
General Assistance
State medical assistance programs
SSI (Supplemental Security Income)
WIC (Supplemental Nutrition Program for
Women, Infants and Children)
Medicaid
Foster Care

Campaign Tip!

■ Team up with the Cooperative Extension Service in your state or community. The CES specializes in helping families manage their personal finances. The national office of the Extension service is very active in the EIC campaign. *To find your state contact, call (202) 720-3377.*

Once you've identified your target programs try these approaches:

- 1. Piggyback on another mailing.** The envelope stuffer and brochure in this kit (or one you create!) can reach thousands of potential EIC users if they are sent along with rent notices, parents' bulletins, benefit checks, newsletters, WIC coupons, waiting list notices, or other mailings.
- 2. Hang posters and leave brochures and flyers in well-traveled areas.** Waiting rooms, offices, community centers, and local stores are good display spots.
- 3. Use video tapes.** Many social service agencies use videotape information displays in their waiting rooms. The Minnesota Alliance For Children and the Minnesota Accounting Aid Society produced an 8-minute video to show how a VITA site assists taxpayers with returns. *For more information and to order a copy of the video, call Jean Bauer at the Working Family Tax Credits Program, (612) 625-5242.*
- 4. Arrange educational meetings and participate in training sessions.** Housing developments, community centers, child care centers, and social services offices are good meeting places. Invite someone from the IRS or a local accounting firm to help answer questions.

Even after you've identified your target audiences and selected your strategies, it still may be a challenge to reach government assistance recipients who are eligible for the EIC because the bureaucracies can be complex to navigate. Following are some specific ideas to help you find the people you are trying to reach.

To reach people in public and subsidized housing, try:

- Local public housing authorities.
- The Farmers' Home Administration, which helps low-income families in rural areas.
- Housing project tenant unions.
- Resident councils or apartment associations.
- Recipients of Low-Income Heat and Energy Assistance (LIHEAP). *To find the LIHEAP coordinator in your state, call (202) 401-9356.*
- State housing finance agencies, which offer tax credits to real estate developers who build low-income housing.
- Low-income housing coalitions. The National Low-Income Housing Coalition in Washington, D.C. has a listing of tenant organizations and housing coalitions nationwide. *Call Mark Granowitter at (202) 662-1530.*
- Community Development Corporations and other nonprofit housing organizations and developers, including Habitat for Humanity and ACORN.

■ Advocates for the homeless and homeless shelters. *For more information about outreach to the homeless call the National Law Center on Homelessness and Poverty at (202) 638-2535, or Paul Heimer of the Alexandria Coalition for the Homeless, (703) 525-7177.*

■ Each year, most cities, counties and states submit a Consolidated Plan to qualify for certain federal grants. The Consolidated Plan outlines plans for addressing needs of low and moderate-income families, and is an excellent place to include plans for EIC outreach. *For more information, call Mark Granowitter of the Low-Income Housing Information Service at (202) 662-1530.*

Campaign Tips!

■ Some state and local governments are creating "one-stop shopping" for people eligible for a number of different government benefits. Streamlined procedures that determine Food Stamp, AFDC, and Medicaid eligibility all at once could determine EIC eligibility too! *For more information, call Charles Mondin, United Seniors Health Cooperative at (202) 393-6222.*

■ The Minnesota Department of Revenue has developed software that social service professionals can use to help clients determine EIC eligibility and estimate the size of their credit. *For more information, call Steve Conroy at (612) 297-1575.*

■ Community Development Corporations and other community-based organizations are interested in the economic health of their neighborhoods. EIC outreach fits well with this mission. *The Center on Budget and Policy Priorities is working to involve CDCs in the EIC campaign. For information about what CDCs in your area are doing, call the Center at (202) 408-1080.*

■ Remember that child care employees often earn low-wages and may be eligible for the EIC. Be sure your outreach efforts in the child care community target employees as well as the families that receive subsidized care.

To reach people who receive free or low-cost child care, try:

- Child care centers.
- Child care resource and referral agencies.
- Head Start programs. *For a list of Head Start programs in your area, contact your state Head Start Association or contact the Head Start Bureau at P.O. Box 1182, Washington, DC, 20013, (202) 645-3707. The list is free for nonprofits; \$10.00 for everyone else.*
- Schools that offer preschool programs.

To reach people in job training programs, try:

- Financial aid offices in community colleges. **Remember!** Full time students ages 19 to 23 can count as qualifying children for the EIC. Their parents may be eligible for the credit.
- Job Training Partnership Act and Private Industry Council programs. *For the name and number of your local JTPA/PIC program, call the National Association of Counties at (202) 393-6226.*
- Vocational education programs. *For the name and number of the vocational education director in your state, call the National Association of State Directors of Vocational-Technical Education at (202) 737-0303.*
- The Job Corps program. *For information call the National Job Corps Office at (202) 219-8550.*
- The AFDC employment and training program (JOBS). *For information about reaching JOBS participants, contact your state or local JOBS office. For more ideas on reaching this population, call Mike O'Connor of the Center for Law and Human Services at (312) 341-1666.*
- The Family Self-Sufficiency Program, which increases participation in employment, education, and job training programs among public housing recipients. *For more information, call your local public housing authority, or call (202) 708-2841.*

To reach unemployment compensation recipients:

Many newly unemployed workers are eligible for the EIC for the first time. Because a good number will not be eligible for other government assistance, it is critical that they get the EIC.

A 1992 law allows states to include an EIC notice with the 1099-G forms mailed each January to unemployment compensation recipients from the previous year. If the EIC notice does not increase the postage, the federal government pays for the mailing. Campaigns should encourage states to do this mailing. Use the envelope stuffer or material in this packet to design a simple message.

Campaign Tip!

- Reaching out to *applicants* for unemployment compensation also is important because even those who don't qualify may still be eligible for the EIC. Casework meetings are an excellent opportunity for this outreach. *Contact your state department of labor to arrange for EIC materials to be available through unemployment offices.*

To reach people who receive AFDC, Food Stamps, SSI or General Assistance:

AFDC, General Assistance, and Food Stamp programs are generally run through a state's department of human resources or social services. The SSI program operates out of the state Social Security Administration.

Campaign Tip!

- Don't forget that many disabled adult SSI recipients live with their families and may be "qualifying children" for the EIC. Outreach to this population is important.

Many people who receive AFDC, Food Stamps, and General Assistance work and may be eligible for the EIC. Research suggests that about 40 percent of families that receive AFDC during a two-year period have some earnings in that period. In addition, one-quarter of all EIC-eligible families receive Food Stamps at some point during the year. For these reasons, informing Food Stamp and AFDC recipients about the EIC is very important. Try to reach:

- Current and new recipients.
- Newly employed recipients and former recipients.
- Applicants who are denied benefits.
- People receiving transitional child care and transitional Medicaid benefits.

To reach people who use Medicaid, WIC, and other health programs, try:

- Public health departments.
- Community and migrant health centers.
- WIC program sites.

To reach foster parents, try:

- The foster care manager in your state and the foster parent association in your state. *For more information, contact Charles Black of the National Foster Parent Association at (815) 455-2527*
- Nonprofit agencies that provide foster care services through a contract with the state, or organizations that independently operate foster care programs. *Your state foster care manager should be able to provide you with the names of these groups.*

For more information on helping people who receive government assistance get the EIC, call Cindy Anderson of the Washington Department of Social and Health Services, (360) 413-3095 or Reuben Leslie of the Texas Department of Human Services, (512) 438-4175.

6. Reach out to people who don't speak English

Why is this important?

EIC outreach is especially important in communities where English is not the primary language. Non-English-speakers often earn low incomes and are very likely to qualify for the EIC. Unfortunately, most tax services and public information campaigns are conducted in English.

How do you do it?

1. Use bilingual material whenever you can. In the kit you will find Spanish translations for all the public education materials. *Translations of the EIC flyer in Amharic/Ethiopian, Arabic, Cambodian, Chinese, Farsi, French, Haitian-Creole, Hmong, Italian, Korean, Laotian, Russian, Tagalog, Ukrainian, and Vietnamese are available upon request from the Center on Budget and Policy Priorities.*

2. Work with religious groups.

Mistrust of government and the IRS runs high in some communities. Outreach through religious groups can help people feel more comfortable about applying for the EIC.

3. Tap into non-English media. Many non-English-speaking communities have their own radio and television programming, as well as magazines and newspapers. Encourage news coverage, run ads, write articles, or develop public service announcements on the EIC. For more information on involving Spanish-language media in EIC promotion, contact the Poverty Project, National Council of La Raza at (202) 785-1670.

4. Take advantage of community-based groups and activities. Mutual Assistance Associations provide helpful services to refugees from some countries. *To find the MAA in your state, call the Southeast Asia Resource Action Center at (202) 667-4690.* You also can distribute information about the EIC to organizations that serve new Americans, and at:

- Cultural festivals.
- Health fairs.
- Educational events.
- Job training events.

Campaign Tips!

■ Campaigns have found that tax preparers in their communities sometimes mistakenly tell immigrant workers that they are not eligible for the EIC, even if they are! An important part of your campaign will be educating immigrant workers and tax preparers about eligibility for the EIC. *Use the fact sheet in this kit called "Questions and Answers About the EIC" or call the National Immigration Law Center at (213) 938-6452 for more information.*

■ Non-English radio stations will appreciate it if you provide translated PSAs. *For Spanish translations of the sample PSAs in this kit, call the Center on Budget and Policy Priorities at (202) 408-1080.*

5. Develop links with schools. Many states have migrant education coordinators within their education departments, as well as English as a Second Language programs. Encourage schools to provide bilingual take-home notices, and to post bilingual materials.

6. Work with rural and urban mobile health care units. Mobile health care providers often target non-English-speaking communities.

7. Make sure bilingual free tax help is available. Work with the local VITA coordinator to make sure there are sufficient volunteers available who speak the language of the community. *For more information about working with the IRS and VITA, see page 18 of this guide. Also see the piece in this kit called "VITA! Free Tax Preparation for Low-Income Workers."*

8. Remember that immigrant workers can also be eligible for the EIC. Many legal immigrant workers who are *not* eligible for welfare are eligible for the EIC, and the EIC does not affect immigration status. Special outreach efforts are needed because tax laws are complicated and language barriers often stop eligible immigrant workers from filing for the credit. *For more information, see the sheet in this kit called "Questions and Answers about the EIC" or contact the National Immigration Law Center at (213) 938-6452.*

7. Reach out through schools

Why is this important?

Campaigns can reach many potential EIC recipients by doing outreach through schools that serve low-income families. School officials are often viewed as trustworthy members of the community. When information comes from the school it is likely to catch a parent's eye.

Some school employees may also be eligible for the EIC, particularly those who work only part-time such as crossing guards, cafeteria staff, library workers, or teachers' assistants.

How do you do it?

Consider these avenues for distributing materials:

■ **Schools in which many students are eligible for free or reduced-price meals.** Many of the parents of children who receive free or reduced-price meals will be eligible for the EIC! Information can be distributed along with school mailings like lunch menus. *The state department of education can help you decide which schools to target. The district superintendent or the food service director are also good contacts.*

■ **Chapter 1 remedial programs.** Because they serve economically disadvantaged elementary school children, Chapter 1 programs and their parent advisory committees are good places to reach low-income workers. *The state department of education can help you locate Chapter 1 schools.*

Campaign Tips!

■ In Rhode Island, a local EIC campaign arranged with a school principal to send EIC notices along with report cards to every student.

■ In addition to helping you reach EIC recipients, schools can be a good source for help with your campaign. Accounting students from the University of Notre Dame provided free tax preparation services for over 2,000 low to moderate-income workers. *For more information, call Ken Milani at (219) 631-5296.*

- **Community colleges.** Remember! Full-time students ages between ages 19 and 24 can be qualifying children for the EIC. Older students who have returned to school to improve their job skills may be working part-time or at low wages, and could be eligible for the EIC.
- **Parent Teacher Associations.** PTAs often organize information drives through mailings and community assemblies — ask them to help distribute EIC material.
- **General Education Diploma programs.** Many GED participants are likely to be eligible for the EIC. Ask administrators to send EIC information with GED certificates. *For local GED contacts, call the National American Council of Education hotline at 1-800-62-MYGED.*

8. Work with your local IRS office

Why is this important?

Many local IRS offices do considerable EIC outreach. In some cities, strong partnerships have developed between the IRS and EIC campaigns. This has several important advantages:

- It gives your campaign extra credibility.
- It increases your resources.
- The IRS can answer difficult, technical questions about the EIC.

How do you do it?

1. Join forces to improve VITA services. VITA stands for Volunteer Income Tax Assistance. It is a free, IRS-sponsored program to help low-income workers fill out their tax forms. Most communities have several VITA clinics, although there are not as many in rural areas. To make sure VITA services are as good as they can be, EIC campaigns can:

- Help advertise the availability of VITA.
- Recruit volunteers, especially those who speak languages common in the community.
- Help set up new VITA sites in underserved communities or neighborhoods.
- Determine the best locations and hours of operation.
- Refer eligible families to VITA.

Electronic filing can improve VITA services. When tax returns are filed by computer, refunds generally come back more quickly. Talk with your regional VITA/Taxpayer Education coordinator about arranging for electronic filing at VITA sites. *See fact sheet section of this kit for a contact list.*

2. Share materials. The IRS has excellent EIC promotional materials, generally available in large quantities for free. *Call your local IRS taxpayer education coordinator or call 1-800-TAX-FORM.*

3. Coordinate media efforts. News conferences, news releases, public service announcements, and radio and television interviews are excellent ways to increase awareness about the EIC. The IRS has public affairs staff who work with the media, and the national IRS office distributes television public service announcements to each of its local offices. Consider coordinating efforts. At the very least, let the IRS know about your planned activities.

4. Plan joint presentations. Informational meetings held at worksites, religious institutions, schools, and other community sites offer excellent opportunities for campaigns and local IRS staff to do joint presentations.

Campaign Tips!

■ Your local IRS office may be willing to put your organization's logo and hotline number on its EIC materials — at no cost to you!

■ The IRS has dedicated some funds to put electronic filing in local IRS offices and VITA sites. Talk with your taxpayer education coordinator about this.

■ Free tax preparation clinics can be useful year round to help people with retroactive filing and advance EIC payments. Also, since workers with very low earnings do not pay income tax, they are not obligated to meet the April 15 tax filing deadline. These workers can file for the EIC at any time during the year.

For more information on VITA and tax preparation issues, see the fact sheets in this kit called "VITA! Free Tax Preparation for Low-Income Workers" and "Commercial Tax Preparation and the EIC: Helping Workers Keep All of Their Refund."

9. Use the media

Why is this important?

Media coverage is crucial to EIC outreach. It's one of the best ways to reach eligible workers and to attract additional organizations to a campaign. Media coverage also helps make policymakers and opinion leaders aware of the importance of the EIC and brings attention to some of the problems low-income workers face.

How do you do it?

1. Create a press list.

Developing a list of contacts at most local newspapers, television, and radio stations is a good idea. Your contacts should include reporters assigned to cover social issues or taxes, financial editors, or personal finance columnists. There may be more than one good contact at larger organizations. For smaller ones, the city editor or the assignment editor will be your best contact. It's best to compile your press list well before you begin your campaign and be sure to include:

■ **Television stations, including cable outlets.**

■ **Print media.** Include free community advertisers or shoppers guides, and any appropriate city or community magazines.

■ **State or city offices of news services.** If you live near a state capitol or large city, Associated Press or other wire services should have offices nearby.

2. Put together a press packet.

The media will need written materials that explain what the EIC and your campaign are all about. Having these materials available in other languages will help in some communities. Your press packet should include:

■ **A news release.** The news release can announce the start of your campaign or focus on some other campaign event. Cover all the key facts in your lead paragraphs and keep the language simple. A local angle to the story is very important. This often is the "hook" that sparks the interest of busy reporters and editors. Include names and phone numbers of contacts for follow-up questions.

■ **A fact sheet on the EIC.** You can use the EIC fact sheet in this kit or write your own. EIC participation figures for your state (also in the kit) will be of particular interest. Add these figures to any fact sheet you use.

■ **A media advisory.** If you are holding a news conference or other campaign event, you will want to issue a media advisory to announce it. Include the time, place, purpose and the names and titles of all speakers.

■ **A list of campaign partners.** Often, the involvement of an officeholder, celebrity or prominent business, union, or charity in your campaign will increase media coverage.

■ **Tax forms.** A Schedule EIC and a Form 1040A tax return will help reporters understand how families apply for and receive the EIC. They also can be used as graphics for a story.

3. Work the story.

There will be opportunities for media coverage throughout the course of your campaign. But the two *best* chances for coverage are when the campaign is launched and the week leading up to the April 15 tax filing deadline.

In the beginning of the campaign —

Hold a kick-off news conference. Coordinate your event with the Center on Budget and Policy Priorities' national kick-off event, generally held in late January, or select a date based on local considerations. *Contact Donna Cohen Ross at (202) 408-1080 for details on the Center on Budget and Policy Priorities' media plans.* Talk to your local IRS office about planned activities. Consider holding the kick-off at a VITA site!

Media Tip!

It is especially important to get media advisories to news services like the Associated Press. These offices distribute lists of area news events that media organizations use to decide what to cover each day. Ask for your event to be listed in the "day book."

Media Tip!

Keep a set of talking points on the EIC handy. They will help members of your campaign answer questions and speak persuasively when talking with the media. Use the talking points in the kit or develop your own.

As the campaign continues —

- **Hold an Earned Income Credit Day.** These events, sponsored by local government agencies, businesses, unions, or others can be a good source of media coverage.
- **Get an article on the editorial page.** The editorial page is one of the most-read sections of a newspaper. Request a meeting with the editorial board to discuss the EIC, or submit an op-ed or opinion column.
- **Take advantage of community calendars and bulletin boards.** Many newspapers and radio stations will print or announce events as a public service. Make sure any campaign-related activities, hours for VITA clinics, or EIC days are included.
- **Get your campaign on public affairs programs or talk shows.** The EIC is a good topic for public affairs or talk shows. IRS officials along with leaders of your campaign can be featured guests.

Media Tip!

- Media outreach doesn't have to end on April 15. Workers who earn too little to pay federal income tax can file their returns at any time and still get the EIC. They won't have a penalty or fine. Consider distributing a news release shortly after April 15 that makes this point.

Nearing the end of the campaign —

The last weeks before the filing deadline are ideal for a follow-up news release and for re-contacting members of the media. Many news organizations that do not do tax-filing stories earlier will do them in the final days before April 15. But don't wait until the last week to write the news release. Since news organizations plan their tax-season coverage well in advance, draft and send a final-week news release well ahead of time.

4. Use advertising.

- The flyer in this kit, or one of your own design, can be used as an ad in community and church bulletins, and in weekly or small daily newspapers. Some newspapers may be willing to run the ad free, as a public service.
- Bus or other public transportation ads are excellent ways to get the word out. Since they can be expensive, investigate having some of this advertising donated as a public service. *For more information, call Lori Rogovin of the Maryland Committee for Children at (410) 752-7588.*
- Billboard advertising can be donated by local advertising agencies. This is a good way to publicize a local EIC hotline telephone number.

5. Develop public service announcements.

Radio and television stations often make free air time available to nonprofit or community groups for short public service announcements, or PSAs. The Earned Income Credit is an ideal subject for a 15-, 30-, or 60-second PSA. Sample PSAs are shown on page 25. Here are some things to consider:

- Focus on stations whose audiences are most likely to be eligible for the credit, like those stations that are popular in low-income or minority communities.

- Some stations may want you to record your own PSA. Others will want you to provide a script for the station's on-air personalities to read. Spots featuring the station's own announcers may be more likely to get on the air. Provide versions of your PSA in different lengths.
- Radio or television stations may be willing to help you produce PSAs for free. Ask!
- Mail recorded PSAs or scripts well before they are to be broadcast. Six to eight weeks in advance is not too early to send your materials. Include a press packet (*see page 20*) and some suggested air dates.

For Spanish versions of sample PSA's, contact the Center on Budget and Policy Priorities at (202) 408-1080.

More Media Tips!

- For some reporters, especially those in TV or radio, talking with a family that has benefitted from the EIC may mean the difference between doing a story and not doing one. Try locating two or more families for any news conferences you hold. Ask them if they'd be willing to be available for individual interviews throughout your campaign.
- Media like to focus on *new* angles or fresh developments. Consider highlighting a worker whose recent move from public assistance to the workplace has been aided by the EIC. Or feature a creative new outreach approach you've launched for the first time.
- In previous years, the Center on Budget and Policy Priorities has distributed radio actualities (pre-taped, ready-for-airing news stories) on the EIC in March and early April. This year, we'll provide guidelines to local campaigns on how to do actualities themselves. This will enable you to highlight your EIC Campaign and to place your own local contact or hotline number on the actuality. *For information on producing EIC radio actualities, call the Center at (202) 408-1080.*

10. Improve the EIC through your state legislature

Why is this important?

Advocates and legislators working together can make a powerful team in support of the EIC. Passing state laws related to the EIC can increase the number of people who get the credit and conserve resources for local campaigns.

How do you do it?

1. Make EIC outreach a law.

Several states have passed laws *requiring* that state agencies send EIC information to groups of people likely to be eligible for the credit: state employees, people who receive AFDC, Food Stamps, Medicaid, or other benefits, foster parents, people receiving unemployment compensation, and others. At least one state has mandated that all employers notify workers about the credit.

Campaigns have used several successful strategies to help enact outreach laws. Before approaching legislators or committee chairs, try to:

- **Draw-in the decision-makers.** Invite key social services officials to participate in your efforts. In some instances, this might be the state human resources administrator; in others it may be the director of a local welfare office.
- **Get high-profile support.** Enlist the support of other key officeholders such as the governor, mayor or county commissioner. The National Governors' Association, the Conference of Mayors, the National Association of Counties, and the American Public Welfare Association all support the EIC outreach campaign.

For more information on creating a state law to promote EIC outreach, call Carmen Luevanos of the Texas Comptroller's Office at (512) 463-4511, or Julie Hamos, Julie E. Hamos and Associates, (312) 641-5757 (regarding the Illinois law).

2. Take action to improve consumer protections.

Advocates for low-income workers are increasingly concerned about the quick refunds offered by commercial tax preparers. A "quick refund" means a commercial tax preparer files a tax return and the taxpayer gets a check from the preparer within a few days. The "refund" in this situation is not coming from the IRS, but from the commercial preparer as a high-interest rate loan. The real name for a quick refund is a "refund anticipation loan," and the fee for the quick refund is actually an up-front interest payment on the loan. In several states, steps have been taken to:

- Make sure consumers understand what a quick refund really is.
- Make sure interest rates on these services are not excessive.
- Make sure consumers are given more complete information about their options when paying to have their tax returns prepared.

For more information, call Steve Holt of the City of Milwaukee, at (414) 286-5582, and see the fact sheet in this kit called "Commercial Tax Preparation and the EIC: Helping Workers Keep All of Their Refund."

3. Advocate for a state-level, refundable EIC to increase the value of the credit.

New York, Wisconsin, Minnesota and Vermont have established refundable state EICs that add to the federal credit. Other states are working to establish their own EICs. There are several important reasons why a refundable state EIC is important:

- It has all the benefits of the federal EIC and makes even more money available to low-income workers. It shows a state's commitment to making work pay enough to live on.
- In most states, low-income people pay more of their earnings in state and local taxes than do higher income people. A state EIC helps fix this imbalance.
- A state EIC is not difficult to administer. Most states simply set their EIC at a percentage of the federal credit — at 25 percent for example — so separate forms aren't necessary.

For more information about state EICs call the Center on Budget and Policy Priorities' State Fiscal Project at (202) 408-1080.

Sample Public Service Announcements

15 Seconds

If you worked last year and earned a low income, the IRS could owe you money. Call one-eight-hundred, eight-two-nine, ten-forty and ask about the Earned Income Credit, a tax benefit for people who work.

30 Seconds

If you worked last year, even part time, and earned a low income, the IRS could owe you money up to thirty-five hundred dollars if you're raising children. It's called the Earned Income Credit, a tax benefit for people who work.

To get the credit you must file a federal tax return. If you're raising children, file Form 1040 or 1040A and attach a second form called Schedule E-I-C. If you're not raising children, file any federal tax form.

To find out more, call the IRS toll free at one-eight-hundred, eight-two-nine, ten-forty.

60 Seconds

If you worked last year, even part time, and earned a low income, the IRS could owe you money — up to thirty-five hundred dollars if you're raising children. It's called the Earned Income Credit, a tax benefit for people who work.

It used to be just for families. But now even those without children can get a small credit.

Getting the credit is easy. You just file a federal tax return. If you're raising children, file Form 1040 or 1040A and attach a second form called Schedule E-I-C. If you're not raising children, file any federal tax form.

If you qualify, you'll either owe less in taxes, or get a check back from the IRS. You can even get the credit if you owe no income tax.

Want to know more? Call the IRS toll free at one-eight-hundred, eight-two-nine, ten-forty. Ask your employer about getting advance EIC payments in your paycheck. Put some extra cash in your pocket. Check out the Earned Income Credit.

Where to get more information about running an EIC campaign

The following manuals or reports are available from EIC campaigns around the country:

- "Updates on the 1996 Outreach Campaign for the Federal Earned Income Credit and the Minnesota Working Family Credit." Call Sherry Lampman, Minnesota Alliance for Children at (612) 487-0348.
- EIC Campaign Report and materials, 1992-96. Call Lori Rogovin, Maryland Committee for Children at (410) 752-7588.
- "Washington State Outreach Campaign, 1993." Call Cindy Anderson, Washington Department of Social and Health Services at (360) 413-3095.
- "Promoting EITC in Ohio: Ideas That Work." Call Teri Dixon, Public Affairs Officer, Internal Revenue Service, Cincinnati District at (513) 684-2172.
- "Earned Income Tax Credit: More Money For Working People." Call Claire McLeveighn, Georgians For Children at (404) 365-8948.
- "Final Report 1996: The EIC Public Information Campaign." Call Diane DiGiacomo Peck, The Piton Foundation, Denver, Colorado, at (303) 825-6246.
- "Annual Report on the Tax Counseling Program, July 1996." Call Michael O'Connor, Center For Law and Human Services, Chicago, Illinois, at (312) 341-1666.
- "Earned Income Credit Outreach Campaign: Training Manual for LISC Americorps Members." Call David Jones, Local Initiatives Support Corporation, New York, New York at (212) 455-9800.

Translations of EIC Materials

The Center on Budget and Policy Priorities would like to thank the following organizations and individuals for their help in translating the EIC flyer for the 1997 Earned Income Credit Outreach Campaign:

Amharic/Ethiopian — Robert Moser, *Catholic Charities, Refugee and Immigrant Services*, San Diego, CA
Arabic — Antoinette Abdelmalek, *Association for Children of New Jersey*, Newark, NJ
Cambodian, Chinese, Laotian, Vietnamese — Pam Kian, *California Department of Social Services*, Sacramento, CA
Farsi — Jo Marcel, *Catholic Charities, Immigration and Citizenship Department*, Los Angeles, CA
French — Frederic Claus, *French American Foundation*, New York City, NY
Haitian-Creole — Edy Sanon, *Haitian-American Community Council*, Tallahassee, FL
Italian — Nancy Sottile, *Federation of Italian-American Organizations of Brooklyn*, NY
Korean, Russian — John Atherton, *Washington Department of Social and Health Services*, Olympia, WA
Tagalog — Arlen Buntua, CPA and Laurene Buntua, Washington, DC
Ukrainian — John Kuhn, *US Ukraine Foundation*, Washington, DC
